



ONBASE TRAINING

create your future



www.utdallas.edu



What is OnBase : Create, Manage and Retrieve

- Document management system
- Store documents securely and electronically in a central location
- User friendly interface that allows easy retrieval of documents
- Documents can be viewed, printed, emailed, and have notes added to them
- Workflow module for departments that want to use OnBase to process documents



Login

OnBase 13
a Hyland Software solution

Domain

User Name

Password

Login

Depending on modules licensed, this product may contain portions of:
Imaging technology © Snowbound Software, Inc.
Full Text Indexing technology © Autonomy.

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Document Retrieval Dialog Window Layout

- Document Type Groups
- Document Types
- Dates
- Keyword

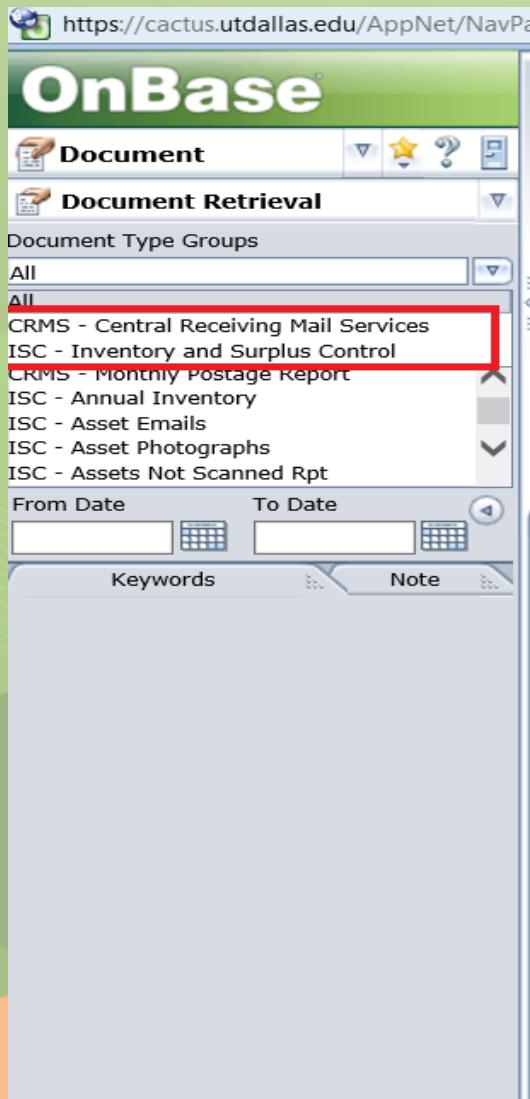


OnBase Document Retrieval

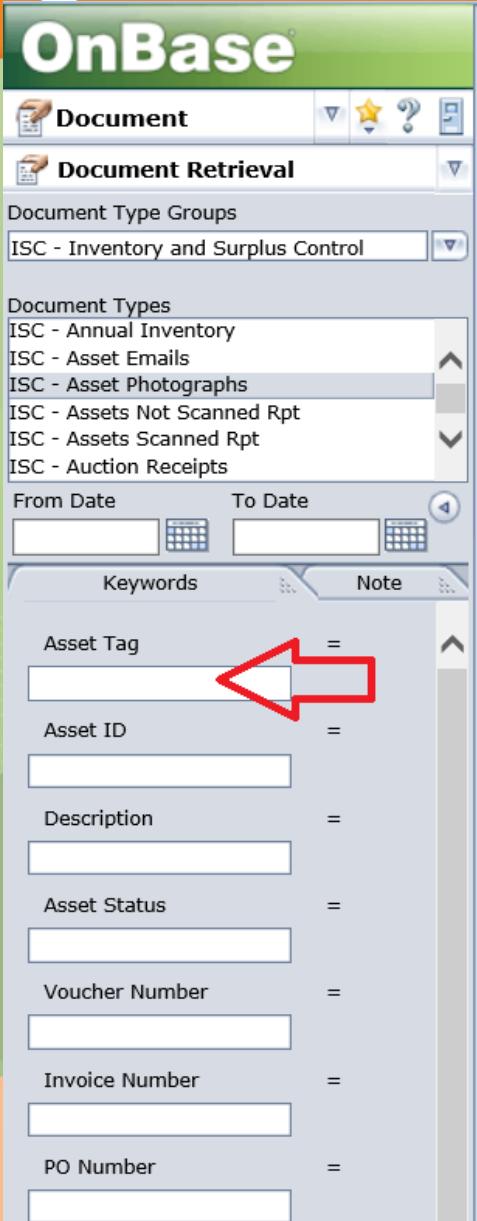


1. Document Type Groups:

- Document type groups are groups defined by our organization
- A group is a general heading for specific types of documents
- Ex. Inventory and Surplus control



- There are two document type groups:
 - Central Receiving Mail Services (CRMS)
 - Inventory and Surplus Control (ISC)



- Anything that has a **tag number**, you can find it on OnBase.
- Assets can be looked in the following categories ;
 - asset emails
 - photographs
 - credit card receipts
 - custodian update request
 - custody receipts
 - gift in kind documentation
 - MISC (miscellaneous)
 - missing stolen report
 - property master record
 - state transfer
 - transfer forms
 - vehicle titles



OnBase

Document

Document Retrieval

Document Type Groups
All

Document Types
SC - Audit Reports
SC - Building Barcodes
SC - Credit Card Receipt
SC - Custodian Update Request
SC - Custody Receipt
SC - Daily Rpt
SC - Gift-in-Kind Documentation
From Date To Date

Keywords Note

Print

Documents
64909 - LAPTOP HP 6510N - ISC - Custodian Update Request - 5/12/2014

Zoom In Zoom Out Fit Width
Actual Size Fit in Window

Next Document Previous Document





Custodian Update Receipt

The screenshot shows the OnBase software interface. On the left, the navigation pane displays "Document" and "Document Retrieval" sections, along with "Document Type Groups" and "Document Types". Under "Document Types", "ISC - Custodian Update Request" is selected and highlighted with a red box. On the right, the main workspace shows a "Documents" list with the entry "64909 - LAPTOP HP 6510N - ISC - Custodian Update Request - 5/12/2014". Below the list is a toolbar with various icons. The document content area displays an email message from "White, Gregory" to "Boulom, Alisa" with a subject line about a laptop. The message body contains text about a professor's laptop and ends with contact information for Alisa Boulom. At the bottom of the document view, it says "Page 1 of 1." and "0 Note(s)". A red arrow points to the "Asset Tag" field in the search criteria on the left, which contains the value "64909".

White, Gregory

From: Boulom, Alisa
Sent: Monday, May 12, 2014 11:08 AM
To: White, Gregory
Cc: Ritchey, David; Sanzgiri, David; Calisir, Engin
Subject: RE: Laptops Tag #'s 64909 and 73275

Hello Greg,
Professor George Barnes was incorrectly marked as inactive and is an active adjunct instructor. He just verified with me that he still uses 64909 HP 6510N laptop and it is in his possession.

Mark McNabb is no longer employed at UTD and 73275 MacBook Air laptop is now used as a JSOM "check out laptop". New custodian is me, Alisa Boulom 2010167825.

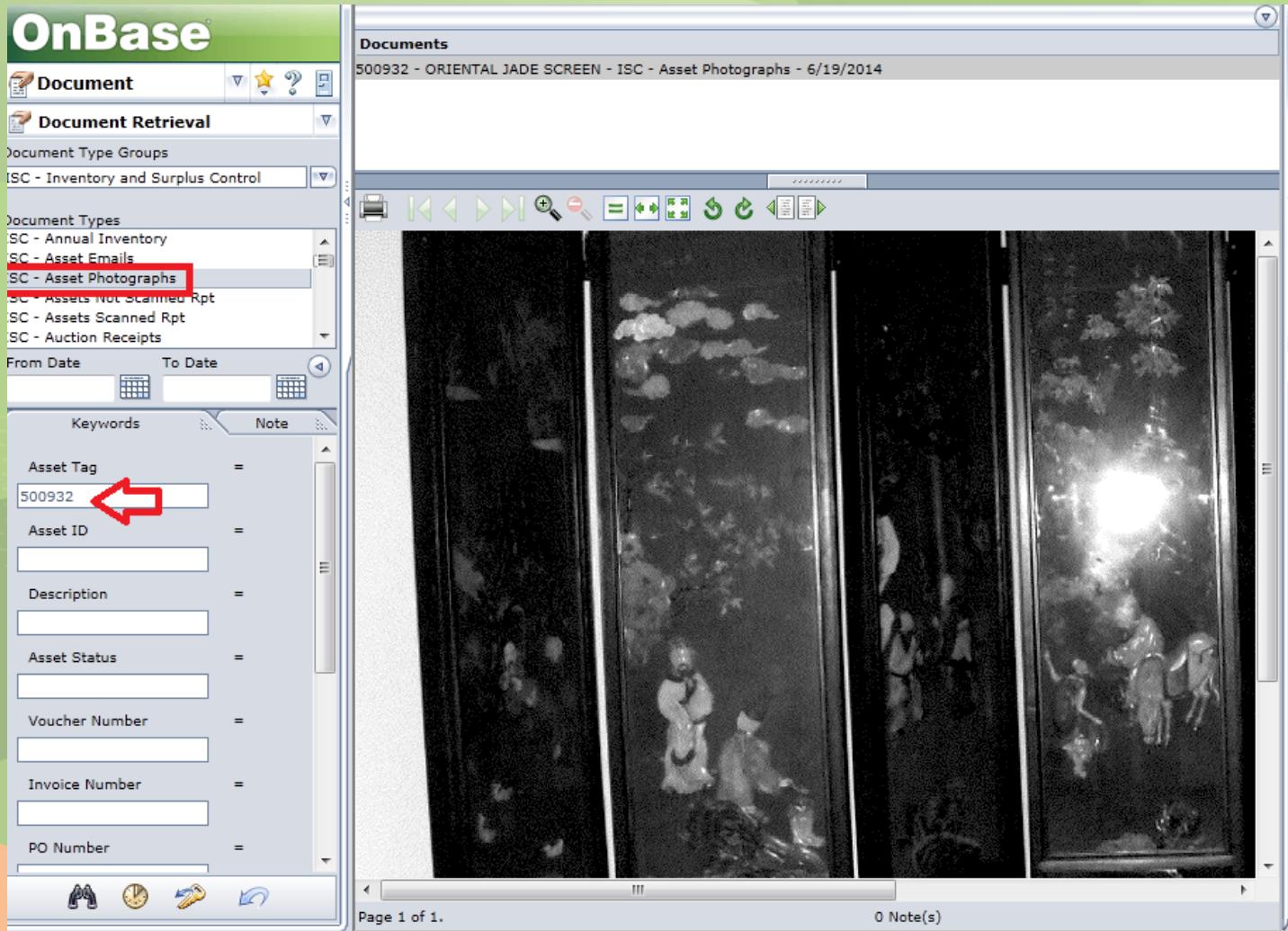
Thank you,

Alisa Boulom
Administrative Assistant
JSOM Technology Services
972-883-4484
aboulom@utdallas.edu

From: Thorp, Craig
Sent: Monday, May 12, 2014 10:00 AM
To: Boulom, Alisa
Cc: Ritchey, David; White, Gregory; Garner, Carla
Subject: Laptops Tag #'s 64909 and 73275

Page 1 of 1. 0 Note(s)

Asset Photographs



The screenshot shows the OnBase software interface. On the left, the 'Document' tab is selected. In the 'Document Types' section, 'SC - Asset Photographs' is highlighted with a red box and has a red arrow pointing to the 'Asset Tag' field in the search criteria. The search criteria includes:

- Asset Tag: 500932
- Asset ID: (empty)
- Description: (empty)
- Asset Status: (empty)
- Voucher Number: (empty)
- Invoice Number: (empty)
- PO Number: (empty)

The main pane displays a document titled "500932 - ORIENTAL JADE SCREEN - ISC - Asset Photographs - 6/19/2014". It contains four vertical photographs of an ornate oriental jade screen. The first three panels show the screen from different angles, while the fourth panel shows a bright light source behind the screen.



Credit Card Receipt

The screenshot shows the OnBase application interface. On the left, the "Document Retrieval" panel is open, displaying a list of document types under "Document Types". The "ISC - Credit Card Receipt" type is selected and highlighted with a red box. Below this list are search fields for "From Date" and "To Date", and a keyword search section with fields for "Asset Tag", "Asset ID", "Description", "Asset Status", "Voucher Number", "Invoice Number", and "PO Number". A red arrow points to the "Asset Tag" field, which contains the value "75733". To the right of the retrieval panel is the main "Documents" view, which displays a credit card receipt document titled "75733 - TABLET IPAD 16GB - ISC - Credit Card Receipt - 7/25/2013". The document header includes the date "09/05/2012 10:56:28" and the store name "HiEd Inc., dba UTD Technology Store". The receipt details a purchase of an "APPLE IPAD WI-FI + 4G ATT 16" with serial number "DVHV5CUDV66" for \$629.00. It shows a subtotal of \$629.00, tax of \$0.00, and a total of \$629.00. Payment information includes a credit card ending in "XXXX9498" and a ticket number "S80892190". The receipt is dated "09/05/2012 10:55:55".



Gift in Kind Documentation

OnBase

Document

Document Retrieval

Document Type Groups
ISC - Inventory and Surplus Control

Document Types
ISC - Custodian Update Request
ISC - Custody Receipt
ISC - Daily Ret.
ISC - Gift in Kind Documentation (highlighted with a red box)
ISC - Global Assets
ISC - Inventory Validation
ISC - MISC

From Date To Date

Keywords

Asset Tag = 501317 (highlighted with a red arrow)

Asset ID

Description

Asset Status

Voucher Number

Invoice Number

PO Number

Documents

501317 - 58 BOOKS MICHAEL SAVOIE - ISC - Gift in Kind Documentation - 6/19/2014

501317 18HB 45B, 4CD, 2DVD JUN 07 2012

In-Kind Gift Acceptance Form
Office of Development & Alumni Relations
The University of Texas at Dallas

Date: May 14, 2012

School/Unit: SOM *Mc Dermott Library* (initials)

Department: CDM *Mc Dermott Library* (initials)

Form completed by: Michael Savoie

Phone: X4756 Email: msavoie@utdallas.edu

Is this gift benefiting more than one school or unit? No

If yes, please list units and their contact persons:

Donor's Name: Michael Savoie

Address, City, State, Zip PO BOX 1180, Justin TX 76247-1180

Type of In-Kind Gift:

Art or Collectibles Equipment
 Intellectual Property/Patent Software
 Discount on Purchase (must be in excess of the standard "education discount")
 Other

Description of Gift: Books (58) 75 / CAT T2

Benefit to University: enhance student access to classic and current works

Value of Gift: \$500.00 (87001)

Source of Valuation: Internal Donor Appraiser

Condition of Gift: New Good Poor Unknown N/A

Special Storage Requirements: Yes No

Page 1 of 1. 0 Note(s)

Packing Slips

OnBase

Document

Document Retrieval

Document Type Groups
ISC - Inventory and Surplus Control

Document Types
 ISC - Mobile Asset Validation List
ISC - Packing Slips (highlighted)
 ISC - Property Master Record
 ISC - Property Procedures
 ISC - State Transfer
 ISC - Transfer Forms

From Date To Date

Keywords Note

PO Number =

Voucher Number =

Invoice Number =

Asset Tag =
79000 ← (highlighted)

Description =

Location =

Areal ID =

Documents
S048325 - ISC - Packing Slips - 2/12/2014

Packing List

Agilent Technologies

Customer Purchase Order Number		
S048325/1038583		
Agilent Sales Order Number	Ship Date	
3316194	14-Jan-2014	
Freight Terms	Incoterms	
Prepaid	DDP	
Ship Method	Carrier Reference Number	Trip Number
FED EX-GROUND		8073604

Bill To:
 Electro Rent Corp
 6060 Sepulveda Blvd
 VAN NUYS CA 91411-2501
 United States

Attention: PD# S048325/Attn: Wooyeon Choi
Ship To:
 University of Texas at Dallas
 2811 N Floyd Rd
 RICHARDSON TX 75080
 United States
Telephone: 214-202-7805
ECN 3,802

Please Direct Inquiries To:
 Electro Rent Customer Care Center
 Telephone: 1-800-455-5445
 Email: csc@electorent.com

Agilent Sales Office:
 Agilent Technologies Inc. / US
 PO BOX 4028
 ENGLEWOOD Colorado 80155-4026
 United States

For detailed information on the accessories shipped, please refer to the Box Content List located in each individual box.

Buyer Contact: Bruce Spector & Michael Greene
 Buyer Tel #: 818-374-6234 (818) 374-6225
 Buyer Email: bspector@electorent.com & mgreene@electorent.com

Item	Product Number/Description	Total Quantity Shipped	Delivery Number	Serial Number	Country of Origin	Box Number
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Page 1 of 2. 0 Note(s)



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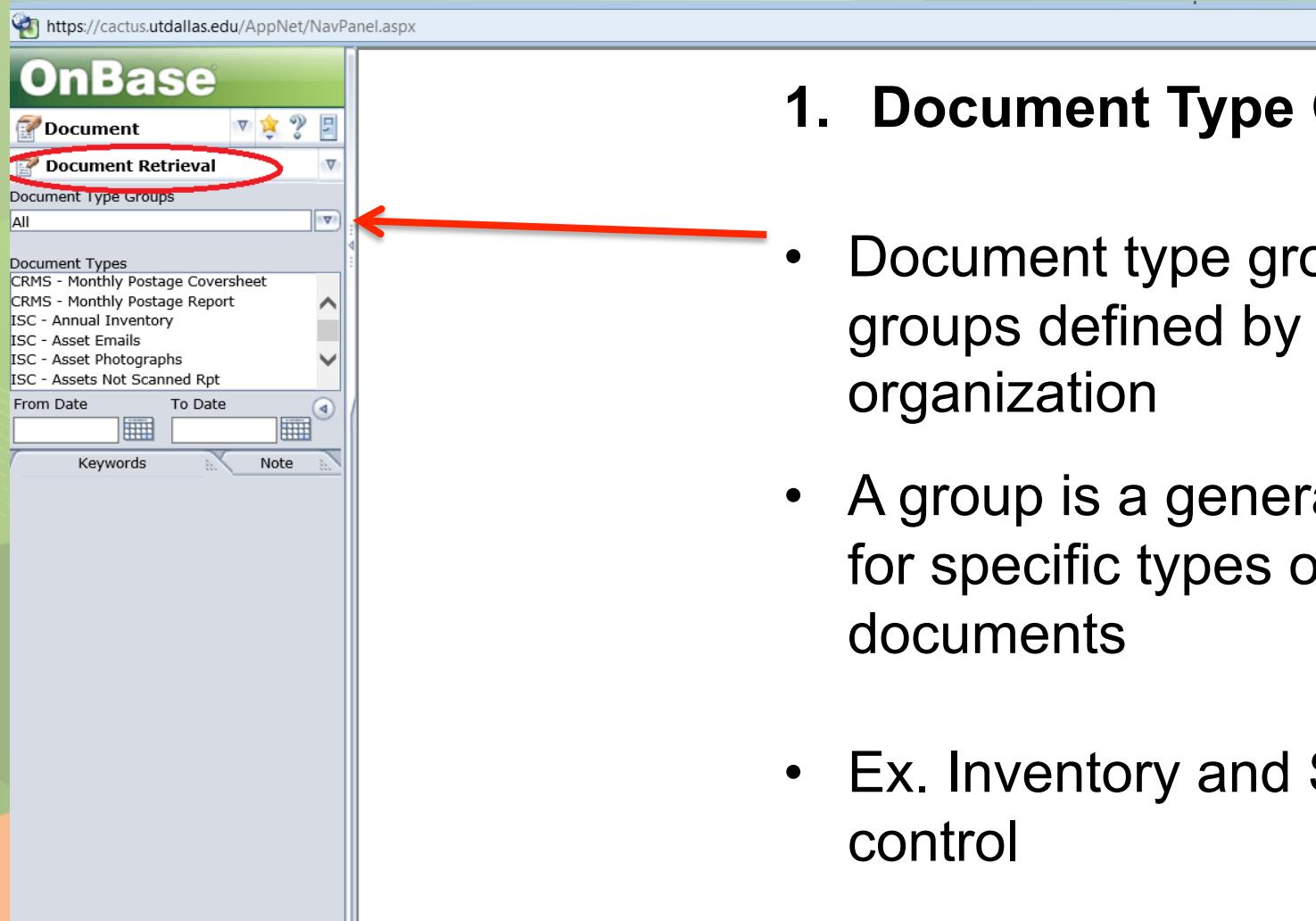
www.utdallas.edu

Document Retrieval Dialog Window Layout

- Document Type Groups
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OnBase Document Retrieval



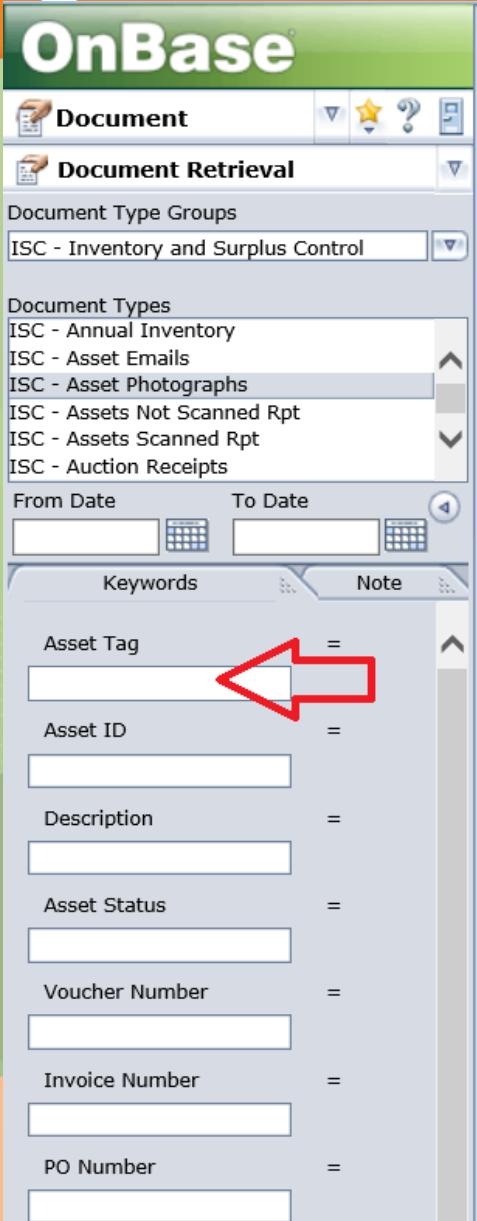
The screenshot shows the OnBase document retrieval interface. At the top left is the URL <https://cactus.utdallas.edu/AppNet/NavPanel.aspx>. The main menu bar has 'Document' and 'Document Retrieval' (which is circled in red). Below the menu is a dropdown for 'Document Type Groups' with 'All' selected. A list of 'Document Types' is shown, including CRMS - Monthly Postage Coversheet, CRMS - Monthly Postage Report, ISC - Annual Inventory, ISC - Asset Emails, ISC - Asset Photographs, and ISC - Assets Not Scanned Rpt. There are date filters for 'From Date' and 'To Date' and search fields for 'Keywords' and 'Note'.

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From Date To Date

Keywords Note

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Zoom In Zoom Out Fit Width Fit in Window Next Document Previous Document

Actual Size



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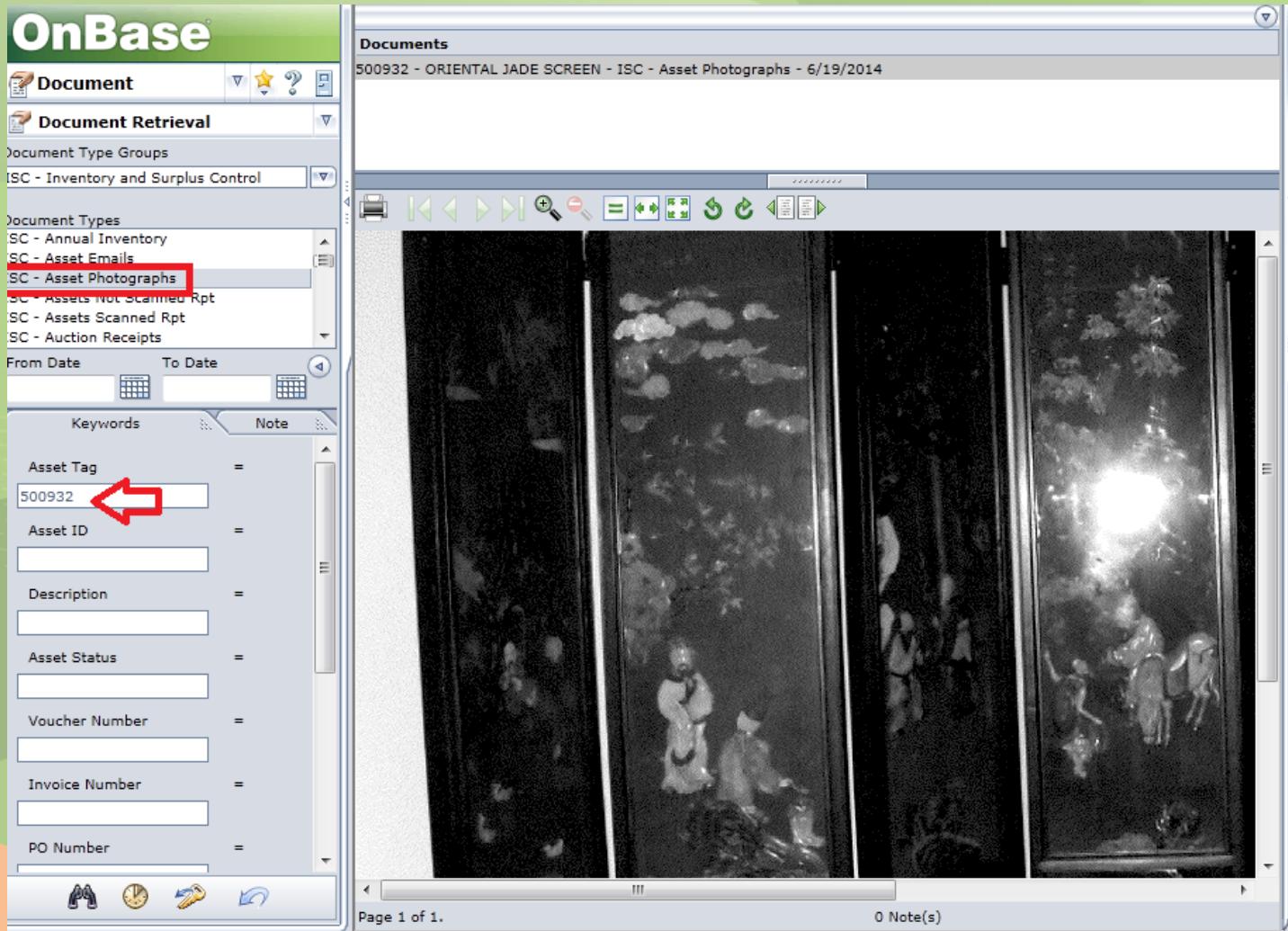
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75733 - TABLET IPAD 16GB - ISC - Credit Card Receipt - 7/25/2013

09/05/2012 10:56:28

HiEd Inc., dba UTD Technology Store
800 W Campbell, VCB Visitor Center
Richardson, TX 75080
(972) 883-6500

Invoice # S80892190 09/05/2012 10:55:55
ADM/ADM Cust# UTDALLO1

PIERRETT LACOUR
UNIVERSITY OF TEXAS @ DALLAS, THE

MD968LLA APPLE IPAD WI-FI + 4G ATT 16
Ser# DVHV5CUDV66
1 @ 629.00 629.00 +

SUBTOTAL
TX 0.00% Sales Tax 0.00 =
TOTAL 629.00 =

Payment
Credit XXXX9498 MCV
Ticket# S80892190 629.00 -
Auth# 046510
Change Due 0.00 -

Page 1 of 1. 0 Note(s)



Gift in Kind Documentation

OnBase

Document

Document Retrieval

Document Type Groups
ISC - Inventory and Surplus Control

Document Types
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ISC - Daily Ret.
ISC - Gift in Kind Documentation (highlighted with a red box)
ISC - Global Assets
ISC - Inventory Validation
ISC - MISC

From Date To Date

Keywords

Asset Tag = 501317 (highlighted with a red arrow)

Asset ID

Description

Asset Status

Voucher Number

Invoice Number

PO Number

Documents

501317 - 58 BOOKS MICHAEL SAVOIE - ISC - Gift in Kind Documentation - 6/19/2014

501317 18HB 45B, 4CD, 2DVD JUN 07 2012

In-Kind Gift Acceptance Form
Office of Development & Alumni Relations
The University of Texas at Dallas

Date: May 14, 2012

School/Unit: SOM *Mc Dermott Library* (initials)

Department: CDM *Mc Dermott Library* (initials)

Form completed by: Michael Savoie

Phone: X4756 Email: msavoie@utdallas.edu

Is this gift benefiting more than one school or unit? No

If yes, please list units and their contact persons:

Donor's Name: Michael Savoie

Address, City, State, Zip PO BOX 1180, Justin TX 76247-1180

Type of In-Kind Gift:

Art or Collectibles Equipment
 Intellectual Property/Patent Software
 Discount on Purchase (must be in excess of the standard "education discount")
 Other

Description of Gift: Books (58) 75 / CAT T2

Benefit to University: enhance student access to classic and current works

Value of Gift: \$500.00 (87001)

Source of Valuation: Internal Donor Appraiser

Condition of Gift: New Good Poor Unknown N/A

Special Storage Requirements: Yes No

Page 1 of 1. 0 Note(s)

Packing Slips

OnBase

Document

Document Retrieval

Document Type Groups
ISC - Inventory and Surplus Control

Document Types
 ISC - Mobile Asset Validation List
ISC - Packing Slips (highlighted)
 ISC - Property Master Record
 ISC - Property Procedures
 ISC - State Transfer
 ISC - Transfer Forms

From Date To Date

Keywords Note

PO Number =

Voucher Number =

Invoice Number =

Asset Tag =
79000 ← (highlighted)

Description =

Location =

Areal ID =

Documents
S048325 - ISC - Packing Slips - 2/12/2014

Packing List

Agilent Technologies

Customer Purchase Order Number		
S048325/1038583		
Agilent Sales Order Number	Ship Date	
3316194	14-Jan-2014	
Freight Terms	Incoterms	
Prepaid	DDP	
Ship Method	Carrier Reference Number	Trip Number
FED EX-GROUND		8073604

Bill To:
 Electro Rent Corp
 6060 Sepulveda Blvd
 VAN NUYS CA 91411-2501
 United States

Attention: PD# S048325/Attn: Wooyeon Choi
Ship To:
 University of Texas at Dallas
 2811 N Floyd Rd
 RICHARDSON TX 75080
 United States
Telephone: 214-202-7805
ECN 3,802

Please Direct Inquiries To:
 Electro Rent Customer Care Center
 Telephone: 1-800-455-5445
 Email: csc@electorent.com

Agilent Sales Office:
 Agilent Technologies Inc. / US
 PO BOX 4028
 ENGLEWOOD Colorado 80155-4026
 United States

For detailed information on the accessories shipped, please refer to the Box Content List located in each individual box.

Buyer Contact: Bruce Spector & Michael Greene
 Buyer Tel #: 818-374-6234 (818) 374-6225
 Buyer Email: bspector@electorent.com & mgreene@electorent.com

Item	Product Number/Description	Total Quantity Shipped	Delivery Number	Serial Number	Country of Origin	Box Number
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Page 1 of 2. 0 Note(s)